

SiteManager Training Manual



Module A
Chapter 1

Contract Administration (+)
Contract Records (+)
Contracts

Section A-1-1-c

Viewing Contracts

Student's Version

Indiana Department of Transportation
March 2009, Version 3.9a

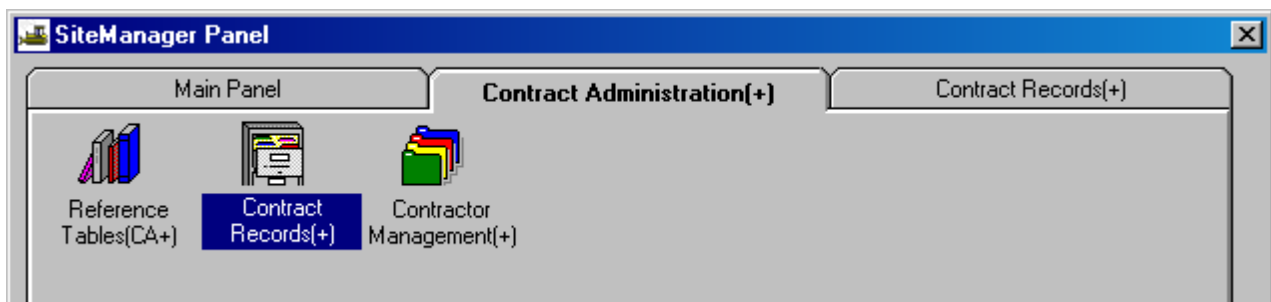
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Viewing Contracts Information

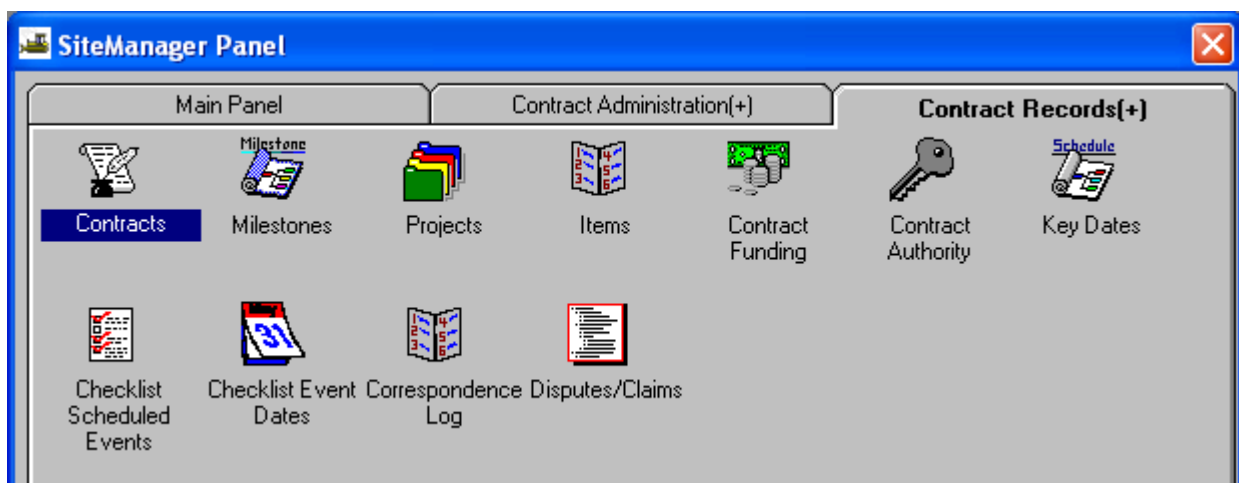
The Contracts window is where the basic data for the contract is located.



“Double-click” on **Contract Administration (+)** located on the Main Panel.



“Double-click” on **Contract Records (+)**.




“Double-click” on **Contracts**.

There are eight tabs where information will be entered for Contracts:

- **Description:** The **Description** tab displays the Contract description data.
- **Location:** The **Location** tab shows the geographic location of the Contract

Payment Data:

- The **Payment Data** folder tab displays the Contract payment data that can be added, modified, or deleted.
- **Critical Dates:** The **Critical Dates** folder tab lets the user view and record the occurrence of Critical Dates.
- **Primary Personnel:** The **Primary Personnel** folder tab lets the user add, modify, and delete the Contract's primary personnel.
- **Prime Contractor:** The **Prime Contractor** folder tab displays the Prime Contractor data.
- **DBE Commit:** Not utilized by INDOT
- **Training Plan:** Not utilized by INDOT

“Click” on the **Open**  button located on the toolbar. **Note:** If a contract has not been selected since the user logged into the SiteManager, then this step is skipped.

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Loca
MT-DOCS	00-0000000	MT_DOCS	ACTV	C094	900			MISC MATERIALS
R-90001	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R-90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT 04
R-90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT 04

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract.

“Double-click” on the appropriate **Contract ID**.

Description Tab

AASHTO SiteManager
File Edit Services Window Help

Contracts

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90002 Fed St/Pr Proj Nbr: STP 3387005
 Status: Active Primary PCN: 9620710
 District: 660 Area:
 Progress Sched:
 Desc: INTERSECTION IMPROVEMENT AND TRAFFIC SIGNAL MODERNIZATION
 Time Charges: WORK DAYS Bid Days: 70 Bid Amt: \$658,493.35
 Contract Type: INTERSECTION IMPROVEMENT
 Work Type: INTERSECTION IMPROVEMENT
 Spec Yr: 1995 Unit System: Metric Suppl Spec Bk Yr: 2004 Alt ID:
 Proposal Fund Type: F/S
 Funding:
☐ Federal
☐ State/Province
☒ Both
☐ Fed Oversight
☐ Local Oversight

Wage Decision:	Wage Decision ID	Wage Decision Description	Genl Wg Dcsn ID
	INDOT001	State Default Wage Decision	INDOT001

- **Contract ID:** is the unique identifier for the contract.
- **Fed St/Pr Proj Nbr:** is the Federal and/or State project number.
- **Status:** **Status** identifies the state of the contract.
 - **Active:** Users access to modify, view, or delete data of the contract in other windows.
 - **Complete:** the contract is complete and locked.
 - **Pending:** status is the initial default setting for all contracts.
- **Primary PCN:** is one of the PCN's on the contract. **District:** is the district responsible for administrating the contract.
- **Area:** is not utilized by INDOT.
- **Progress Sched:** is not utilized by INDOT.
- **Variance Pct:** is not utilized by INDOT.
- **Funding:** indicates that the contract is funded by Federal funds only, non-Federal funds only or both.
- **Desc:** **Description** field is a brief description of the contract.
- **Time Charges:** Time charges are how contract time and progress is assessed during the life of the contract:
 - **Calendar Days**
 - **Fixed Completion Date**
 - **Work Days**
- **Bid Days:** is the original number of days for a contract when the time is charged by work days or calendar days.
- **Bid Amt:** **Bid Amount** is the original bid amount of the contract.
- **Contract Type:** is the classification of the contract.
- **Work Type:** is the classification of the major type of work being performed on the contract.
- **Fed Oversight:** **Federal Oversight** indicates FHWA is included in the Change Order approval process.

AASHTO SiteManager
 File Edit Services Window Help

Contracts

Description	Location	Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Commit	Training Plan
<div> <div>Contract ID: R-90002</div> <div>Fed St/Pr Proj Nbr: STP 3387005</div> <div>Status: Active</div> <div>Primary PCN: 9620710</div> <div>District: 660</div> <div>Area:</div> <div>Progress Sched:</div> <div>Variance Pct: .00</div> <div>Desc: INTERSECTION IMPROVEMENT AND TRAFFIC SIGNAL MODERNIZATION</div> <div>Time Charges: WORK DAYS</div> <div>Bid Days: 70</div> <div>Bid Amt: \$658,493.35</div> <div>Contract Type: INTERSECTION IMPROVEMENT</div> <div>Work Type: INTERSECTION IMPROVEMENT</div> <div>Spec Yr: 1995</div> <div>Unit System: Metric</div> <div>Suppl Spec Bk Yr: 2004</div> <div>Alt ID:</div> <div> Funding <input type="radio"/> Federal <input type="radio"/> State/Province <input checked="" type="radio"/> Both <input type="checkbox"/> Fed Oversight <input type="checkbox"/> Local Oversight Proposal Fund Type: F/S </div> </div>							

Wage Decision	Wage Decision ID	Wage Decision Description	Genrl Wg Dcsn ID
	INDOT001	State Default Wage Decision	INDOT001

- **Local Oversight: Local Oversight** indicates the Local Public Agency is included in the SiteManager Change Order approval process
- **Proposal Fund Type: Proposal Fund Type** is the type of funds used for the contract.
- **Spec Yr: Specification Year** is the specification year of the items used for the contract.
- **Unit System: Unit System** indicates that the measurement system used for the contract is either English or Metric.
- **Suppl Spec Bk Yr: Supplemental Specification Book Year** is the supplemental specification year of the items used for the contract.
- **Alt ID:** will not be utilized at this time
- **Wage Decision: Wage Decision** is located in the Bottom Panel and will be automatically populated with a Default Wage Decision. Wage information will be found outside of SiteManager.

AASHTO SiteManager
File Edit Services Window Help

Contracts

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training

Contract ID: R-90002 **INDOT**

Program Budget Manager: Mona Funds

Project Manager: Penelope Mannington

Design Firm: Designs are Us

CNDT59 - Letter Date of FA Letter: 00/00/00

Additional Contract DBE Data

	DBE	MBE	WBE
Goal Percent:	15	12	12
Original Commitment Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12
Actual Ending Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12

(IN) User Working on Process: abcd

Date Cleared: 12/12/12

Compliance Indicator: abcd

Date 30 Day Notice Letter is Sent: 12/12/09

“Click” on the **Generic Fields** button located on the toolbar.

- **Program Budget Manager:** The name of the Program Budget Manager assigned to the contract.
- **Project Manager:** **Project Manager** is the name of the Project Manager for the Contract. Specific messages and reports are sent to this person by the system.
- **Design Firm:** The Design Firm is the name of the firm that designed the contract.
- **CNDT59 – Letter Date of FA Letter:** the Final Acceptance Letter date.
- **Goal Percent:** The goal set for the contract at time of letting.
- **Original Commitment Amount:** The amount that the contractor listed on their Affirmative Action Certification in their bid, they were committing to pay the DBE sub.
- **Actual Ending Amount:** The amount that the contractor actually paid the sub.
- **(IN) User Working on Process:** the person who is working on the review of the final.
- **Date Cleared:** that date that the DBE Utilization letter was written and sent to Contract.
- **Compliance Indicator:** the indicator for final review to know the status of the utilization, whether P for partial, Q for quantities or X for non-compliance
- **Date 30 Day Notice letter is Sent:** the date the letter of notification to the contractor that they have 30 days to submit DBE-#, MBE/WBE-3 forms.

Location Tab

The Location includes the list of available counties for INDOT and those associated with the selected Contract.

The screenshot shows the AASHTO SiteManager application window. The 'Contracts' tab is active, and the 'Location' sub-tab is selected. The form displays the following data:

Contract ID:	R-90002		
Location:	ON SR 261 AT OAK GROVE/CASEY/FUQUAY RD		
Beg Sta Nbr:	5+440.000	Beg Termini:	001+015
End Sta Nbr:	5+930.000	End Termini:	
Road System:	STATE ROAD	Highway Type:	RURAL MAJOR COLLECTOR
Town:			
Contract County:	WARRICK	Primary County:	<input checked="" type="checkbox"/>

“Click” on the **Location** tab.

Top Panel

- **Contract ID:** is a unique identifier for the contract.
- **Location:** is the geographic location of the physical work of the contract.
- **Beg Sta Nbr: Beginning Station Number** is the beginning control station used during the life of the project.
- **Beg Termini: Beginning Termini** is the beginning point of the contract.
- **Route Nbr: Route Number** is the Federal or State Road identifier within the contract limits.
- **End Sta Nbr: End Station Number** is the ending control station used during the life of the project.
- **End Termini: Ending Termini** is the ending point of the contract.
- **Highway Nbr: Highway Number** is a unique identifier for the route.
- **Road System:** is the type of road and is automatically populated.
- **Highway Type:** is a more specific roadway definition and is automatically populated.
- **Town:** is the nearest locality to the contract and is not utilized by INDOT

Bottom Panel

- **Contract County:** is the county(ies) where the work is being performed.
- **Primary County:** is assigned to one county when multiple counties are involved within the contract.

Payment Data Tab

The Payment Data folder tab displays the Contract payment data.

The screenshot shows the AASHTO SiteManager application window. The 'Contracts' folder is selected, and the 'Payment Data' tab is active. The interface displays various contract details in a form layout:

- Contract ID:** R-90002
- Current Contract Amt:** \$658,493.35
- Generate Est1 Day:** 2
- Contract Limit Amt:** \$0.00
- Liquidated Dam Rate Amt:** \$1,100.00
- Generate Est2 Day:** 16
- Contract Limit Pct:** .00
- ☐ Auto Liquidated Dam
- ☐ Price Adjmnt Ind
- RETAINAGE:**
 - ☐ Securities Allowed
 - ☐ Retain Stkipled Ind
 - ☒ Unlimited Escrow
 - Max Escrow Amt:** \$0.00
- Retainage Changes:**

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	12/14/05	.00	CURRENT AMT	.00	\$0.00	\$0.00	.00	CURRENT AMT

“Click” on the **Payment Data** tab.

- **Contract ID:** is a unique identifier for the contract.
- **Current Contract Amt: Current Contract Amount** is the original dollar amount plus approved change orders dollar amount.
- **Generate Est1 Day: Generate Estimate 1 Day** is the date the first bi-monthly estimate is to be generated. This date is determined by the last number of the Contract ID. (ie Contract R -1234**5** would have the first estimate generated on the fifth day of the month).
- **Contract Limit Amt:** is not utilized by INDOT.
- **Liquidated Dam Rate Amt: Liquidated Damage Rate Amount** is the dollar value assigned to the contract limit amount.
- **Generate Est2 Day: Generate Estimate 2 Day** is the date the second bi-monthly estimate is to be generated. This date is determined by the last number the Contract ID plus fourteen days. (ie Contract R -12345 would have the second estimate generated on the nineteenth day of the month. [5 + 14days = 19th of the month]).
- **Contract Limit Pct:** is not utilized by INDOT.

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	12/14/05	.00	CURRENT AMT	.00	\$0.00	\$0.00	.00	CURRENT AMT

- **Auto Liquidated Dam:** is not utilized by INDOT.
- **Price Adjmnt Ind:** is not utilized by INDOT.
- **Securities Allowed:** is not utilized by INDOT.
- **Retain Stkpled Ind:** is not utilized by INDOT.
- **Unlimited Escrow:** is not utilized by INDOT.
- **Max Escrow Amt:** is not utilized by INDOT.
- **Retainage Changes Panel:** The retainage information is captured in the Retainage Changes Panel when retainage is on a contract.
- **Work Compl Basis:** The **Work Compl Basis** indicates the method used for calculating Retainage. Selections include:
 - Work Reported Per Period
 - Work Remaining, or
 - Work In Place
- **Effect Date:** The **Effective Date** is the date the corresponding retainage percentage begins.
- **Pct:** The **Percent** is the retainage percentage to be applied to the Contract.
- **Pct Base:** The **Percent Base** indicates that retainage should be calculated as a percentage of the bid amount or the current amount
- **Max Pct:** is not utilized by INDOT.
- **Max Amt:** is not utilized by INDOT.
- **Lump Amt:** is not utilized by INDOT.
- **Trgr Pct:** is not utilized by INDOT.
- **Trgr Base:** is not utilized by INDOT.

Critical Dates Tab

A critical date is a one time occurrence during the life of a contract.

Critical Date Description	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	N	N
Award Date	02/16/05	N	N
Price Adjustments Base Date	00/00/00	N	N
Execution Date	02/16/05	Y	N
Letting Date	02/16/05	N	N
Original Completion Date	00/00/00	N	N
Checked Out to Field Date	00/00/00	N	N
Substantial Completion Date	00/00/00	N	N
Contractor Bankruptcy Date	00/00/00	N	N
Contractor Default Date	00/00/00	N	N
Notice to Proceed Date	00/00/00	N	N
Signed Date	00/00/00	N	N
First Day of Work	00/00/00	N	N

Critical Date Description:
 Actual Occurrence Date: ☐ Required to Activate ☐ Required to Finalize
 Distribution List:
 Recipient ID:
 Message Text:

“Click” on the **Critical Dates** tab.

- **Contract ID:** is a unique identifier for the contract.
- **Critical Date Description:** is the System-defined Critical Date type.
- **Actual Occurrence Date:** is the date the event actually occurred. When an Actual Date is entered, the system notifies the selected recipient(s).
- **Rqrd to Activate: Required to Activate** indicates that the event must occur before the Contract status can be changed from pending to active.
- **Rqrd to Finalize: Required to Finalize** indicates that the event must occur before the Contract status can be changed to complete.
- **Distribution List:** is not utilized by INDOT.
- **Recipient ID: Recipient ID** is the User ID of the person to be notified that the event has occurred.
- **Message Text: Message Text** is the Standard message to be sent to the recipient(s).

Definitions of Critical Dates:

1. **Accepted Date:** is not utilized by INDOT.
2. **Adjusted Completion Date:** is calculated by an authorized change order..
3. **Award Date** is the date that the contract has been awarded to the contractor.
4. **Checked Out to Field Date:** The Checked Out to Field Date is not utilized by INDOT
5. **Contract Archived Date:** is entered by the Contract archival process.
6. **Contractor Bankruptcy Date:** is the date the contractor’s date of bankruptcy.
7. **Contractor Default Date:** is the date the prime contractor defaults on the contract.

Contracts							
Description	Location	Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Commit	Training Plan
Contract ID: IR-90002							
Critical Date Description	Actual Date	Required to Activate	Required to Finalize				
Contractor Final Release Date	00/00/00	N	N				
Award Date	02/16/05	N	N				
Price Adjustments Base Date	00/00/00	N	N				
Execution Date	02/16/05	Y	N				
Letting Date	02/16/05	N	N				
Original Completion Date	00/00/00	N	N				
Checked Out to Field Date	00/00/00	N	N				
Substantial Work Complete Date	00/00/00	N	N				
Contractor Bankruptcy Date	00/00/00	N	N				
Contractor Default Date	00/00/00	N	N				
Notice to Proceed Date	00/00/00	N	N				
Signed Date	00/00/00	N	N				
Work Begin Date	00/00/00	N	N				
Critical Date Description: Contractor Final Release Date Actual Occurrence Date: 00/00/00 <input type="checkbox"/> Required to Activate <input type="checkbox"/> Required to Finalize Distribution List: <input type="text"/> Recipient ID: <input type="text"/> Message Text: <input type="text"/>							

8. **Final Acceptance Date: Final Release Date** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Final Release date for the contract.
9. **Execution Date:** is the same as the **Award Date**.
10. **Letting Date:** is a date that the contract bids are opened.
11. **Notice to Proceed Date:** is a written notice to the contractor to proceed with the contract work.
12. **Open to Unrestricted Traffic Date:** is not utilized by INDOT.
13. **Original Completion Date:** is the date that the contract is to be completed as per the awarded contract.
14. **Physical Work Complete Date:** Before entering this date, all Change Orders must be approved or denied. When this date is entered, the system notifies personnel and enters final quantities for active Items and moves all active items to final status. Once this date has been entered and saved, the user will no longer be able to post DWRs on items moved to the Final status.
15. **Price Adjustments Base Date:** is not utilized by INDOT.
16. **Signed Date:** is not utilized by INDOT.
17. **Substantial Completion Date:** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Substantial Completion date for the contract.
18. **First Day of Work Date:** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the First Day of Work date for the contract.
19. **Assign to FieldManager Date:** is not utilized by INDOT.

Primary Personnel Tab

The **Primary Personnel** tab contains contract personnel information. Every Contract must have a Project Manager and a Project Engineer. When an authorized user adds the Project Manager and Project Engineer to the Contract, SiteManager adds them automatically to Contract Authority. If primary personnel are later replaced, SiteManager starts authority for the new personnel and ends authority for the previous personnel.

The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". The menu bar includes "File", "Edit", "Services", "Window", and "Help". The toolbar contains various icons for file operations and data management. The main window is titled "Contracts" and features a tabbed interface with the following tabs: "Description", "Location", "Payment Data", "Critical Dates", "Primary Personnel" (which is the active tab), "Prime Contractor", "DBE Commit", and "Training Plan". The "Primary Personnel" tab displays the following information for Contract ID R-90002:

- Contract ID: R-90002 (with a blue "INDOT" label next to it)
- PE/S: d90snutt (with a dropdown arrow) and Nutt, Skip P.
- Area Engineer: d90ffarm (with a dropdown arrow) and Farmer, Frank
- Contract Designer: Louis Bowdene
- Contract Created By: SYSTEM
- Notification Recipients:
 - Contract Status Changed to Active: User ID: [] Distribution List: []
 - Work Progress Behind Schedule: User ID: [] Distribution List: []
 - Civil Rights Exception Report Generated: User ID: [] Distribution List: []

“Click” on the **Primary Personnel** tab.

- **Contract ID:** **Contract ID** is a unique identifier for the contract and is automatically populated.
- **PE/S:** Project Engineer/Supervisor assigned to the contract.
- **Area Engineer:** is the name of the Area Engineer assigned to the contract.
- **Contract Designer:** is the name of the person or firm that designed the Contract.
- **Contract Created By:** is the name of the user who added the Contract or a system indicator for Contracts built by the system.
- **Contract Status is Changed to Active:** Notification is sent to the Area Engineer when the contract is activated.
- **Distribution List:** is not utilized by INDOT.
- **Work Progress Behind Schedule** is not utilized by INDOT.
- **Civil Rights Exception Report Generated** is not utilized by INDOT.

Prime Contractor Tab

The Prime Contractor folder tab displays the Prime Contractor data.

AASHTO SiteManager

File Edit Services Window Help

Contracts

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90002

Current Prime: 99-9999988 COVER ALL HOLES CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00

Original Prime Contractor:

Prime Contacts:

Contact Name	Contact Type	User Id
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Prime Associates:

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000003	Sure As Taxes Surety	Surety
00-0000002	Insurance Place Holder - See Trns*port	Insurance

“Click” on the **Prime Contractor** tab.

Contract ID: Contract ID is a unique identifier for the contract.

Current Prime: - Current Prime is the Vendor ID and short name for the current Prime Contractor.

Defaulted Original Prime Contractor: Defaulted Original Prime Contractor is the Vendor ID and short name for the original Prime Contractor who was awarded the Contract and then defaulted.

Joint Venture: Joint Venture indicates that the Contract was awarded to a joint venture.

DBE Commit Tab is not utilized by INDOT.

Training Plan tab is not utilized by INDOT.

Viewing the Contracts Window

A -1-1-c Group Exercise

The PE/S needs to be contacted about Contract R -90003.
Review the Contracts window to determine the PE/S for the contract.

Log into SiteManager	<u>inquire</u>
Enter Password	<u>pass</u>

Navigate from the **Main Panel**

“Double-click” **Contract Administration (+)** icon.

“Double-click” **Contract Records (+)** icon.

“Double-click” **Contract** icon.

“Click” the **Open** button.

Select Contract ID: R -90002

“Click” on the **Generic Fields** button located on the toolbar.

What is the **WBE Goal Percent**? _____

“Click” the **Close** button located on the toolbar.

“Click” the **Primary Personnel** tab.

Who is the **PE/S**? _____

“Click” the **Close** button.